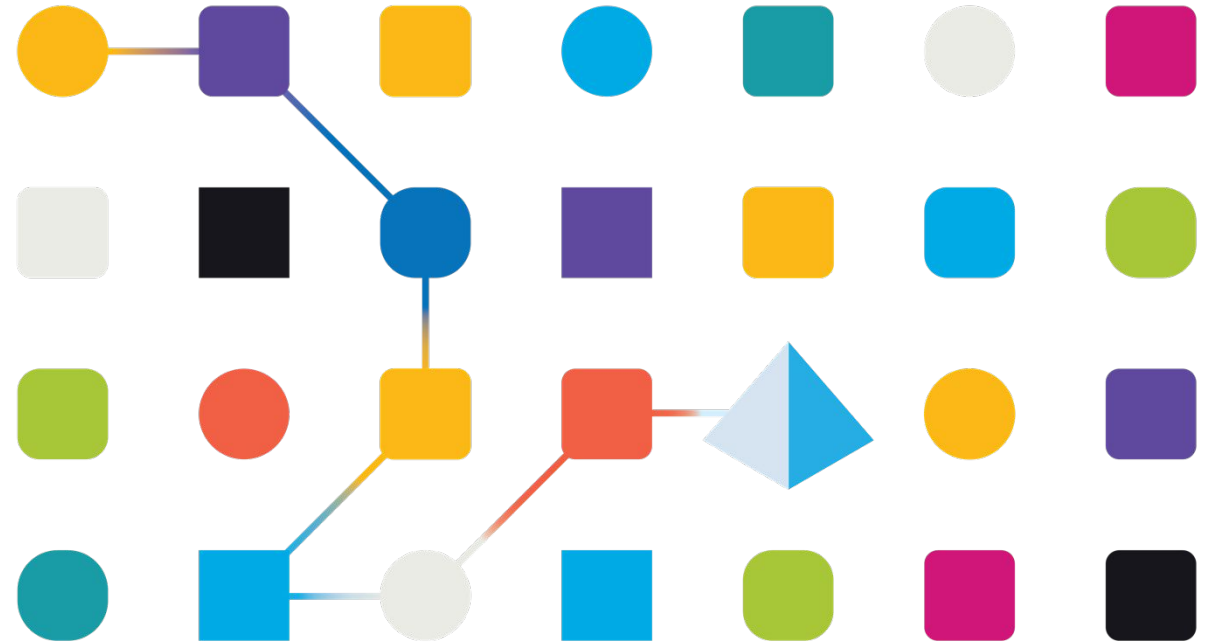# HOW AUTOMATION BOTS ARE HELPING THE NEW MEXICO HUMAN SERVICES DEPARTMENT

Introductions

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HUMAN SERVICES
DEPARTMENT

New Mexico Overview

- Approximately 2 million citizens

- The New Mexico HSD programs serve nearly 1,066,409 million

- Integrates processes, technology, and people to deliver the best possible customer experience

- Focus on "customer obsessed"

- Established a Unified Public Interface for HSD customers

  - Customers can now contact HSD via the channel of their choice, using voicemail, email, chat, phone, mail or in-person visits

  - Increase in HSD customers opting for digital contacts

- RPA Successes

  - **108,322 total resource hours / 53 Annual FTE's**

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Consolidation with the Customer in Mind

- With over 100 phone numbers getting to the "right" person was a challenge for HSD customers

- The only option besides calling was to go to a local office

- HSD made the decision to make the customer experience meaningful through human center design

- Understanding that if a call was resolved the first time: **caller satisfaction and ultimately less cost**
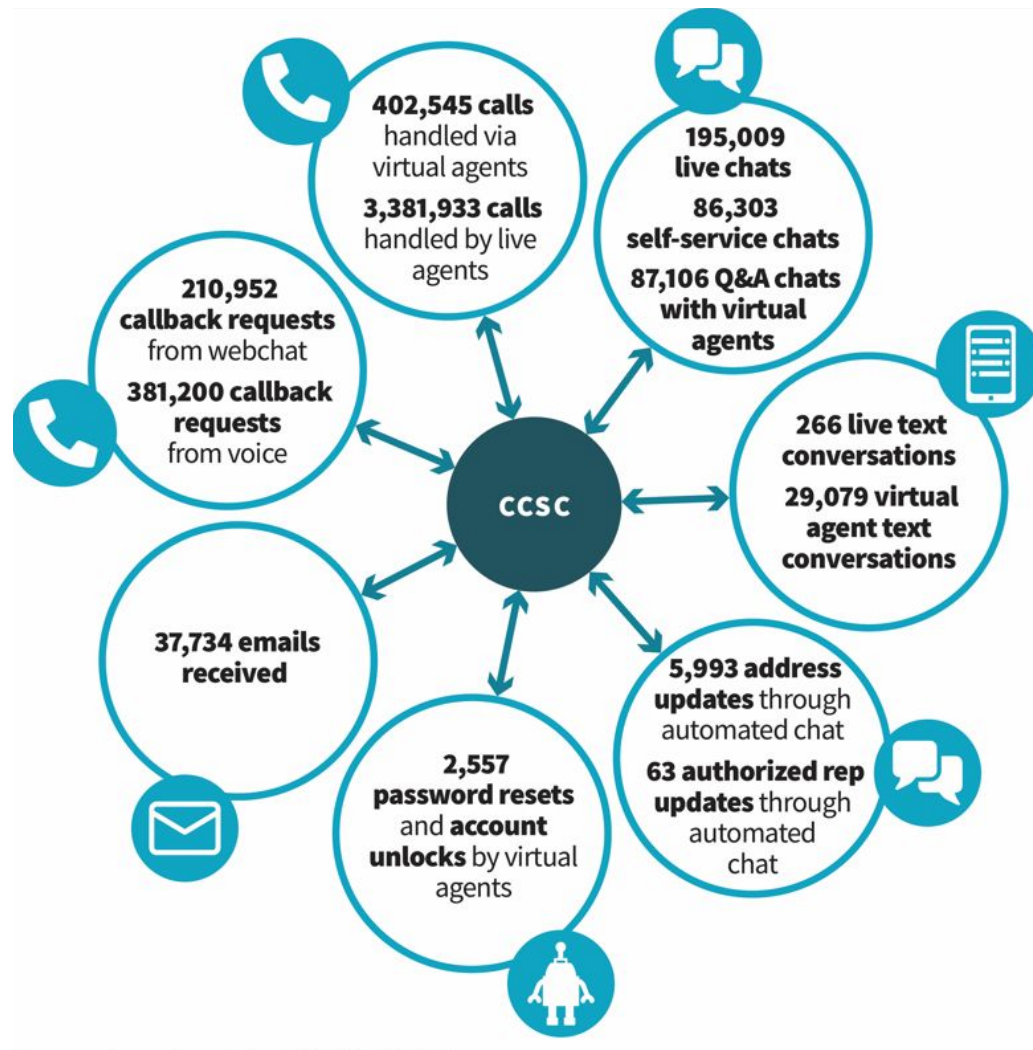
CSAT and improved outcome
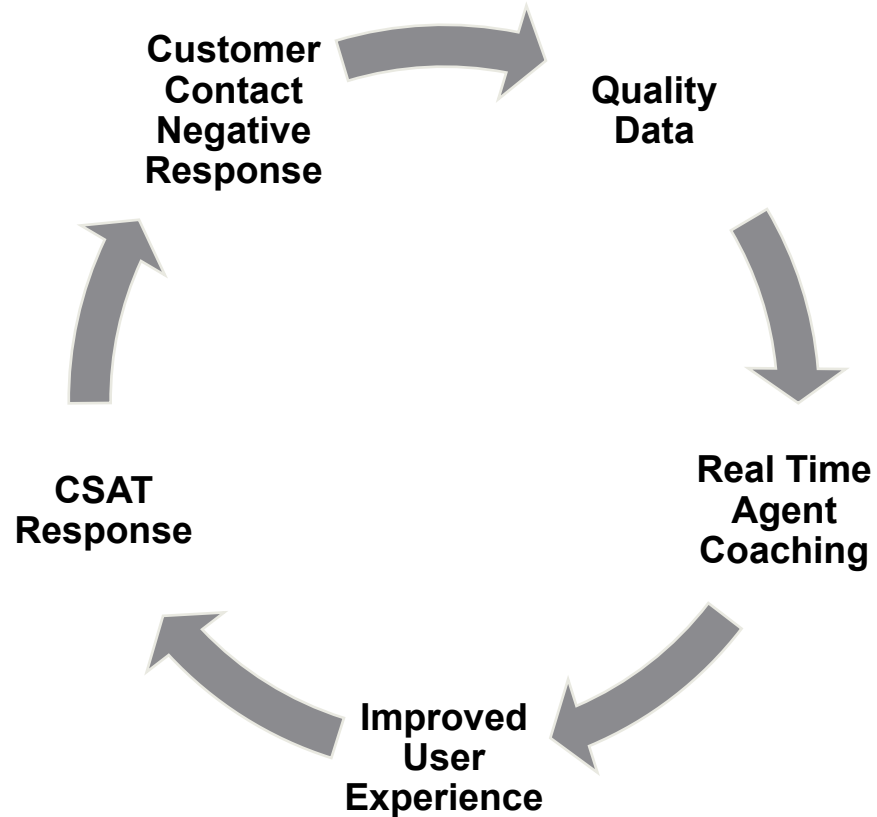
- Original design had agent send caller to CSAT Survey

- Integration into the call flow allowed for automatic direction

- Captured more callers

  - Focus CSAT questions to help drive better outcomes

 - Automatic supervisor call for negative comments

Cycle diagram labels:
- Customer Contact Negative Response
- Quality Data
- Real Time Agent Coaching
- Improved User Experience
- CSAT Response

Human-centered design

402,545 calls handled via virtual agents
3,381,933 calls handled by live agents

195,009 live chats
86,303 self-service chats
87,106 Q&A chats with virtual agents

210,952 callback requests from webchat
381,200 callback requests from voice

ccsc

266 live text conversations
29,079 virtual agent text conversations

37,734 emails received

2,557 password resets and account unlocks by virtual agents

5,993 address updates through automated chat
63 authorized rep updates through automated chat

▪ Created focus groups and surveys to understand from customer point of view

▪ Consolidate to one phone number for customers and one for providers

▪ Created Omni-Channel opportunities to meet the customer where and how they wanted to communicate

— Chat

— Voicemail

— Email

— Virtual Agents available 24/7

Predictive Call Routing

- IVR was initially with natural language

  - It was a challenge for New Mexicans

- Moved to touch and phone number recognition

- Multiple authentication methods
  - Phone number
  - Case number

- Lead to predicative handling
  - First use case is recertification
  - 2% of all calls receive a predictive handling reports; projected to be 8% in the coming months with more scenarios on the way
  - Nearly 70% of callers who receive a prompt confirm that was the reason for their call
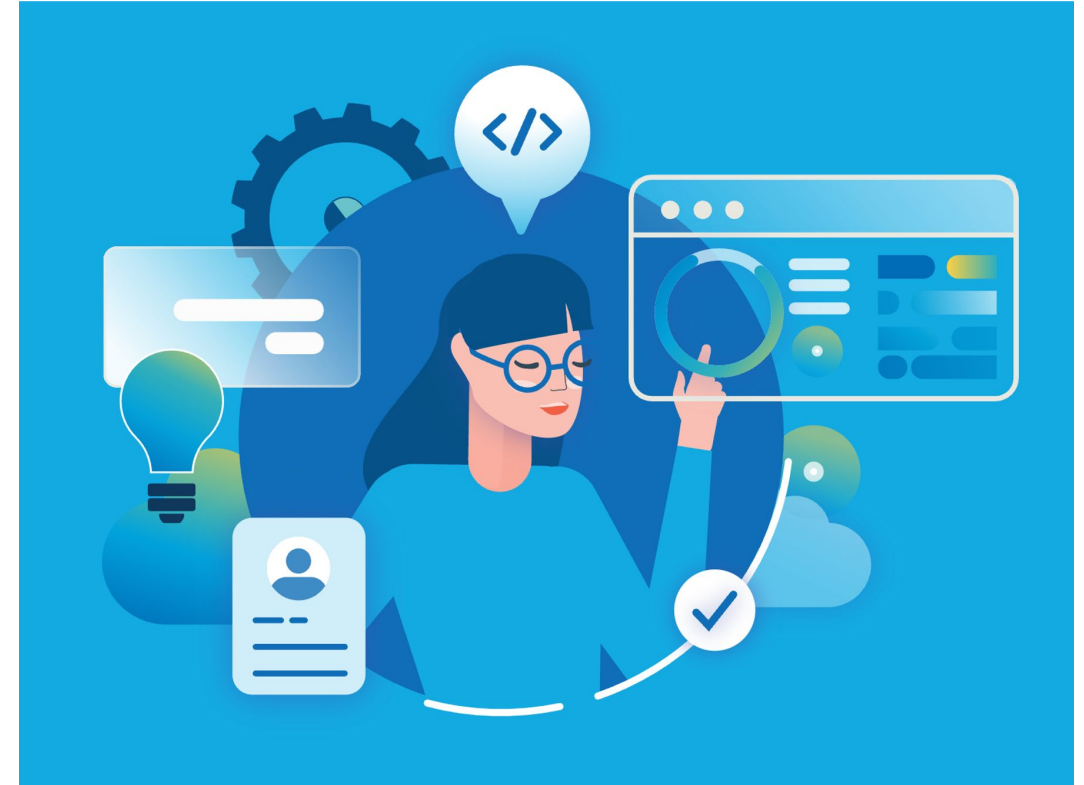
Improved Chat

Chat-Live Agent

30
per day

2020 Average

800
per day and growing

2022 Average

24/7 Virtual Assistant

FAQ

- Meet weekly to collaborate on accuracy
- Improved user accuracy responses

SMS Campaigns

- 7.3M+ Automated and Manual SMS Messages sent to customers
  - Appointments: 185,000+ Automated Appointment reminders and confirmations for various appointment types.
  - Documents: 682,000+ Automated Document receipt notification and notification of review.
  - Renewals: 377,000+ Automated Renewal reminders for various programs (e.g., Medicaid, SNAP, Cash)
  - Applications: Automated Application processing alerts
- New SMS Text Campaign triggered by return mail requesting customer to update address
  - Proactively has customer update address when identified possible change
  - Prevent customer from losing benefits incorrectly

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RPA Rescue

- Virtual Agents from chat and voice

- Address updates into certain state systems

- Add, update, or remove authorized representatives in Aspen

- Reset YES-NM passwords or unlock locked YES-NM accounts

- Transfer case comments from Salesforce to ASPEN and/or CSES

- FAQ chat automation

- Answer questions for Caseworkers and Agents on policy and system*

- Add newborns to their mother's Medicaid case

RPA for repeatable inquiry actions

- **1.3M+ Case Comments**

- **+ Address updates**

- **414,000,000+ Password resets**

- **Over 20,000+ newborns registered to Medicaid**

**Over 108,322 total resource hours
OR
53 Annual FTE's**

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What's on the Horizon?

- Unified Portal – One stop shopping

  – Next step is deployment of unified portal

  – Will consolidate information from multiple independent website to one view for the use.

  – Enabling a one-stop answer to questions around all HSD programs

  – All H&H programs (WIC, Childcare, etc.)

- How can we expand automation? Where are the opportunities?

- Lots of ideas and opportunities for automation.

Questions?

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Interested in learning more about the New Mexico HSD?

Contact:

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Book a 1:1 Workshop to start your transformation journey

Contact:

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